

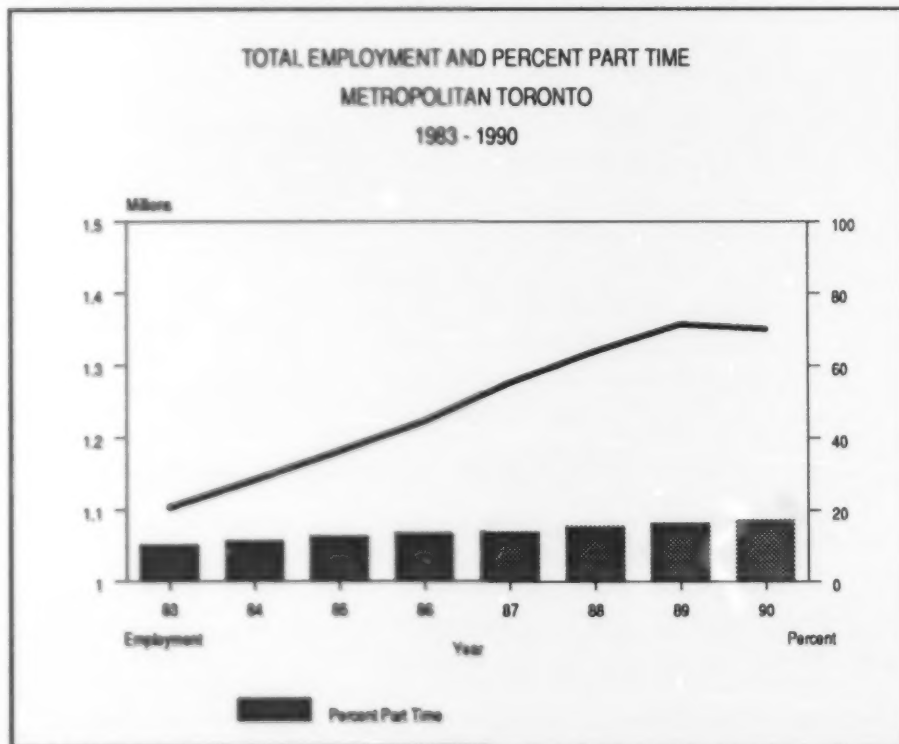
OVERVIEW

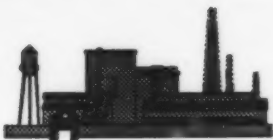
This report summarizes information collected in 1990 by the Planning Department's annual employment survey.

For the first time since the survey was initiated in 1983, employment in Metropolitan Toronto has decreased from one year to the next. After increasing by more than 38,000 every year from 1983 to 1988 and 34,000 between 1988 and 1989, employment was measured at 1,350,000 in 1990; 6,400 less than in 1989. The decrease was compounded by the fact that full time employment decreased by 18,800 and part time employment increased by 12,400.

The loss of employment was concentrated in the Manufacturing/Warehousing sector and centred in Toronto and Scarborough. Small gains were realized in the Institutional and Service sectors.

Despite the decline in employment the number of individual work places (establishments) continued to increase, gaining 1,500 in the past year, to a 1990 total of 82,000.





PURPOSE OF THE SURVEY AND INTERPRETATION OF THE DATA

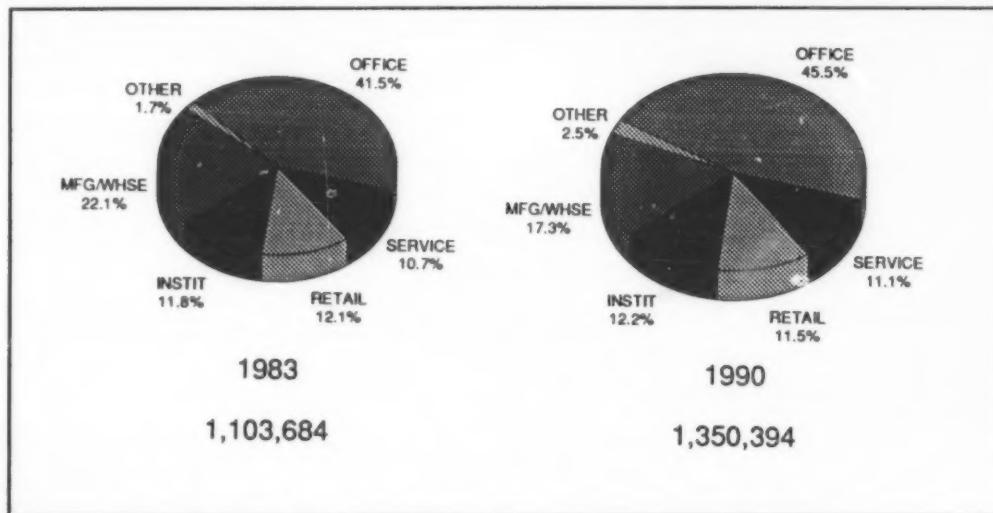
The purpose of the survey is both to monitor economic change and provide information for planning the infrastructure and services in Metropolitan Toronto dependent upon the magnitude and geographical distribution of employment.

When analyzing and interpreting the data it is important to realize how and when the data was collected. The survey is designed to collect employment information over a two-year cycle. All work places in the Scarborough, North York and Islington/Kipling/Bloor Centres, as well as the Central Area, are surveyed every year. In addition, all work places not surveyed in 1989, and all new and previously vacant work places were surveyed in 1990. The survey is conducted annually between May and August, collecting employment and parcel information at the time the work place is surveyed. Data is current as of the time of survey.

In 1990, approximately 70% of the 82,000 identified work places in Metro were surveyed. In order to obtain overall summaries, the 1990 data was supplemented with data from the 1989 survey for work places not surveyed in 1990.

More recent information on the increasing level of employment suggests that the decrease in the level of employment in Metro has continued since the time of the survey.

EMPLOYMENT BY SECTOR

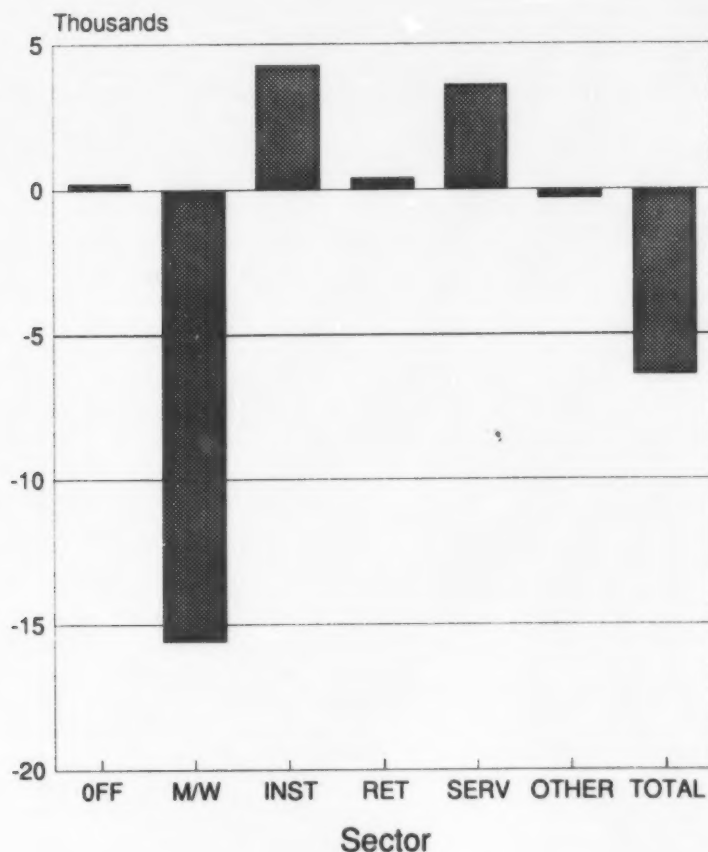


EMPLOYMENT BY SECTOR, METROPOLITAN TORONTO 1983 AND 1990

The distribution of employment by sector has experienced a noteworthy shift since 1983. Manufacturing/Warehousing, which used to account for 22% of all employment in Metro, now accounts for only 17%. Despite losses in Office employment in the past year, this sector now accounts for 46% of all jobs, up from 42% in 1983. The relative share of jobs in the Institution, Retail and Service sectors has not changed significantly.



EMPLOYMENT CHANGE BY SECTOR METRO TORONTO, 1989-1990



While most sectors remained stable between 1989 and 1990, employment growth in the Office sector slowed and the Manufacturing/Warehousing sector continued the decline started in 1987. The increase in the Office sector employment was negligible after averaging annual increases of 26,000 since 1983. There were 15,000 fewer Manufacturing/Warehousing jobs identified in the 1990 survey than there were in 1989. The only significant growth was the 4,000 increase in employment in each of the Institutional and Service sectors.

TOTAL EMPLOYMENT BY SECTOR, METROPOLITAN TORONTO 1983, 1989 & 1990

YEAR	OFFICE	MFG/WHSE	INSTIT	RETAIL	SERVICE	OTHER	TOTAL
1983	458,390	244,060	130,594	133,581	117,808	19,251	1,103,684
%	41.5	22.1	11.8	12.1	10.7	1.8	100.0
1989	614,771	247,538	159,930	154,835	145,975	33,759	1,356,808
%	45.3	18.2	11.8	11.4	10.7	2.5	100.0
1990	614,976	232,969	164,202	155,227	149,572	33,448	1,350,394
%	45.5	17.3	12.2	11.5	11.0	2.5	100.0

Since 1983, employment in Metro has increased by 247,000, 22%. The Office sector grew by 156,600 (34%), the Service sector by 31,800 (27%) and Institutional by 33,600 (26%). The Manufacturing/Warehousing sector declined by 11,100 (-4.5%) over the same period.



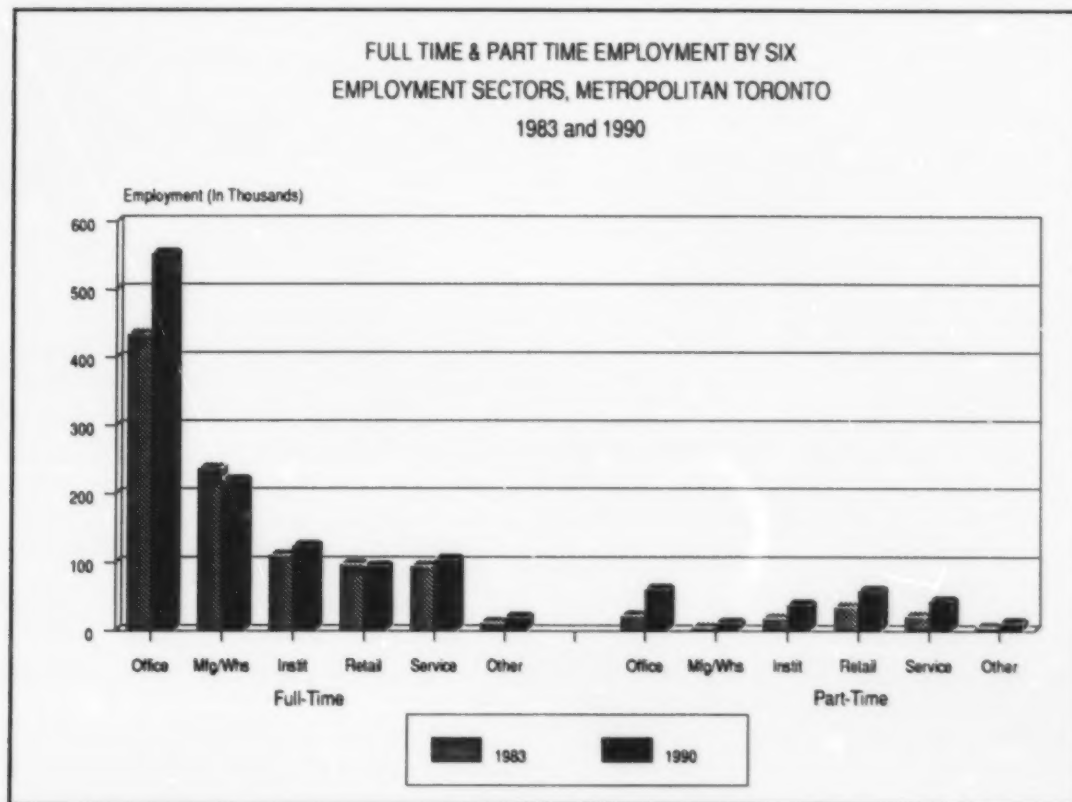
FULL AND PART TIME EMPLOYMENT

In 1990, 230,000, (17%), of Metropolitan Toronto's employment was part time. This reflects an increase of more than 12,000 from 218,000, (16%), in 1989.

Part time employment, defined* as those who are employed in a job for less than thirty hours per week, has grown annually since 1983, more than doubling in this period. The three sectors with the largest number of part time jobs were Office which represented 27% of all part time employment, Retail, 26%, and Service, 19%. With regards to the proportion of employment within each sector part time employment was the most significant in Other where it was 39%, Retail at 38%, and Service at 30%.

Between 1989 and 1990 all sectors of part time employment increased. The largest increase was in Office which gained 15% to 62,000.

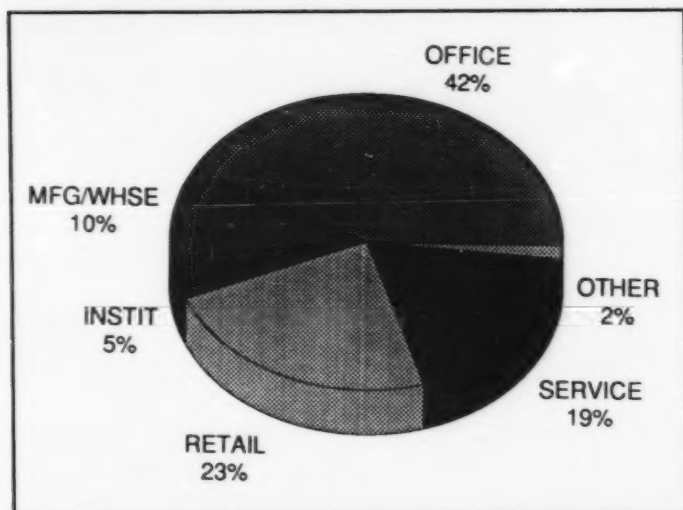
Between 1983 and 1990, full time employment increased in all sectors except Manufacturing/Warehousing and Retail. Institution was the only sector which has increased consistently every year. Between 1989 and 1990, full time employment in Metro decreased with all sectors, except Institution and Service, showing losses. Major decreases occurred in Office, which lost 8,000 and Manufacturing/Warehousing which lost 15,000. The decline in the Manufacturing/Warehousing sector continued a trend started in 1987.



* the definition of part time employment is the same one used by Statistics Canada



WORK PLACES



WORK PLACES BY SECTOR, METRO TORONTO 1990

Despite the decline in number of employees, the number of work places in Metro increased by 1,500 since 1989 to 82,000 in 1990. The Office sector accounts for 42% of the work places, Retail 23% and Service 19%.

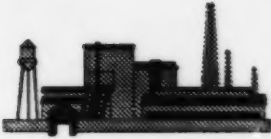
Since 1983 the number of work places in all major employment sectors has increased. Office grew by 30%, Institution by 25%, Retail and Service by 12% each and Manufacturing/Warehousing by 9%. The number of work places in every employment size, except those with more than 500 employees, has increased since 1983.

Between 1989 and 1990, the number of work places with more than 500 employees decreased from 275 to 249. The Office and Manufacturing/Warehousing sectors had twenty fewer locations in this size class. The decline is the result of a combination of firms downsizing and relocating to areas outside Metropolitan Toronto. Of firms with more than 500 employees in 1989 that were no longer in this category in 1990, three located to the United States; six moved to other locations in Canada; ten downsized; and two consolidated with other firms. Changes in the number and type of large firms occur regularly.

A recent study conducted by the Economic Development Department of Metropolitan Toronto identified that of thirty-two Manufacturing/Warehousing firms with over 800 employees in 1981, only seventeen remained in 1988. Only a handful of them had increased their employment during that time.

WORK PLACES BY SEVEN EMPLOYMENT SIZES, BY SECTOR
METROPOLITAN TORONTO, 1983, 1989 AND 1990

EMPT. SIZE		MFG/WHSE						TOTAL
		OFFICE	WHSE	INSTIT.	RETAIL	SERVICE	OTHER	
1 - 2	1983	8,892	1,631	808	6,936	5,019	497	23,783
	1989	11,119	1,717	604	6,669	4,650	313	25,072
	1990	12,232	1,735	661	6,913	4,921	350	26,812
3 - 9	1983	10,674	2,342	829	7,529	6,290	399	28,063
	1989	13,738	3,003	1,440	9,441	7,541	559	35,722
	1990	13,665	2,932	1,428	9,319	7,700	427	35,471
10 - 49	1983	5,316	2,331	1,098	2,069	2,018	278	13,110
	1989	6,311	2,421	1,345	2,254	2,241	368	14,940
	1990	6,437	2,342	1,349	2,261	2,253	345	14,987
50 - 99	1983	779	575	182	235	205	36	2,012
	1989	975	618	192	255	253	66	2,359
	1990	994	556	210	284	260	69	2,373
100 - 19	1983	391	336	98	102	75	16	1,018
	1989	536	352	127	128	87	37	1,267
	1990	511	336	121	135	100	38	1,241
200 - 49	1983	224	183	53	30	29	7	526
	1989	315	188	68	46	49	21	687
	1990	331	185	84	48	50	20	718
500+	1983	115	46	40	11	14	4	230
	1989	153	41	46	9	19	7	275
	1990	144	30	41	7	18	9	249
TOTAL	1983	26,391	7,444	3,108	16,912	13,650	1,237	68,742
	1989	33,147	8,340	3,822	18,802	14,840	1,371	80,322
	1990	34,314	8,116	3,894	18,967	15,302	1,258	81,851

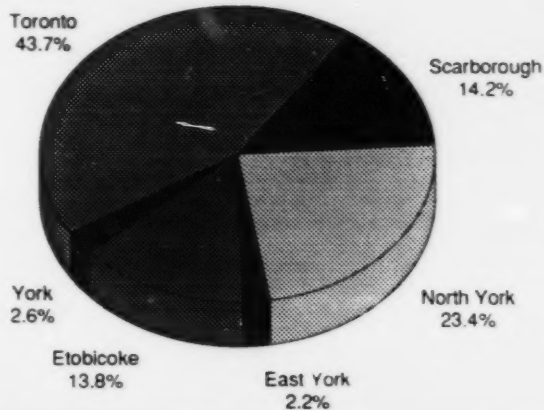


MUNICIPALITIES

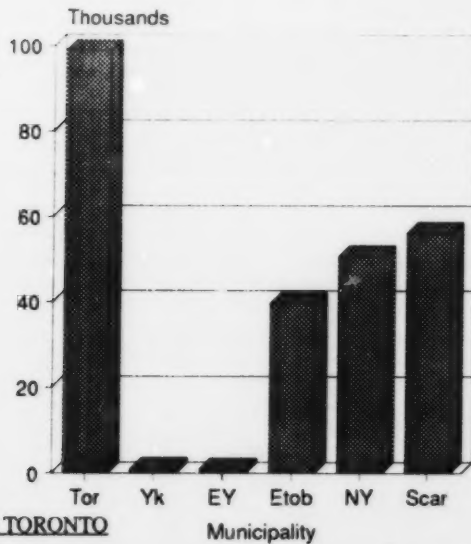
Between 1989 and 1990, employment in Toronto and Scarborough decreased while the other municipalities experienced only marginal increases.

The latest survey shows 44% of Metropolitan Toronto's employment was in the City of Toronto, 23% in North York, 14% in each of Scarborough and Etobicoke, while York and East York contain more than 2% each.

TOTAL EMPLOYMENT METRO MUNICIPALITIES 1990



EMPLOYMENT GROWTH METROPOLITAN TORONTO MUNICIPALITIES, 1983 - 1990



Since 1983, employment in each municipality has increased. While overall employment in Metro has grown by 22%, Scarborough grew by 41%, Etobicoke 27%, Toronto 20% and North York 19%. Employment in York and East York has remained stable.

CITY OF TORONTO

Although employment increased by almost 100,000 in Toronto between 1983 and 1990, there were 6,000 fewer jobs in Toronto in 1990 than there were in 1989.

Part time employment increased by 7,000 while full time decreased 13,000. Most of the losses occurred in the Office and Manufacturing/Warehousing sectors of the economy.

Office employment, which had annual increases as high as 32,000 between 1987 and 1988, decreased by 4,000 in 1990. Part time employment, in this sector, increased 6,000 in the past year and 21,000 since 1983. Despite a gain of 51,000 since 1983, full time Office employment declined 10,000 between 1989 and 1990. Much of the decrease was caused by relocation and general downsizing, especially in the investment sector in downtown Toronto.



Employment in the Manufacturing/Warehousing sector has fallen from 55,000 in 1983 to 39,000 in 1990; 4,500 of this loss was between 1989 and 1990. Losses have resulted from general downsizing, relocation and closures.

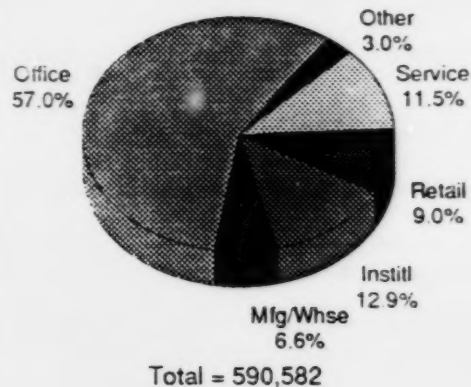
Employment in the Retail sector has been constant at the 53,000 level since 1983 with more than one-third being part time employment.

Employment in Institutions has risen to 76,000 from 58,000 in 1983, but has stabilized in recent years gaining only 1,500 since 1989.

Employment in the Service sector has risen to 68,000 from 51,000 in 1983. Full time in this sector has been consistent while part time has gained 10,000; 1,000 in the past year.

With an employment of 591,000, Toronto contains 44% of employment within Metro. Nearly 55% of Office employment is located in this municipality. It also contains more employment in each of the Institutional, Retail, Service and Other sectors than any other municipality.

EMPLOYMENT BY SECTORS
TORONTO 1990



EMPLOYMENT BY MUNICIPALITIES BY SECTORS
1983, 1989 & 1990

MUNICIPALITY	YEAR	OFFICE		MFG WHSE		REMAINING SECTORS		TOTAL	
		#	%	#	%	#	%	#	%
TORONTO	1983	264,488	53.8	54,798	11.1	172,610	35.1	491,896	100.0
	1989	341,061	57.1	43,394	7.3	212,368	35.6	596,823	100.0
	1990	336,783	57.0	38,867	6.6	214,932	36.4	590,582	100.0
YORK	1983	7,454	22.2	10,053	30.0	16,045	47.8	33,552	100.0
	1989	9,594	28.1	8,368	24.5	16,195	47.4	34,157	100.0
	1990	9,700	28.1	8,166	23.7	16,655	48.2	34,521	100.0
EAST YORK	1983	6,469	22.2	12,311	42.2	10,417	35.7	29,197	100.0
	1989	9,513	31.7	8,724	29.0	11,784	39.3	30,021	100.0
	1990	9,805	32.6	8,746	29.1	11,488	38.2	30,039	100.0
ETOBICOKE	1983	41,535	28.2	53,437	36.2	52,467	35.6	147,439	100.0
	1989	59,951	32.1	61,281	32.8	65,529	35.1	186,761	100.0
	1990	61,303	32.8	57,572	30.8	68,025	36.4	186,900	100.0
NORTH YORK	1983	100,342	37.8	71,891	27.1	93,490	35.2	265,723	100.0
	1989	137,449	43.5	69,727	22.0	108,997	34.5	316,173	100.0
	1990	139,059	44.0	65,060	20.6	112,207	35.5	316,326	100.0
SCARBOROUGH	1983	38,102	28.0	41,570	30.6	56,205	41.4	135,877	100.0
	1989	57,203	29.7	56,044	29.0	79,626	41.3	192,873	100.0
	1990	58,326	30.4	54,558	28.4	79,142	41.2	192,026	100.0
METRO TORONTO	1983	458,390	41.5	244,060	22.1	401,234	36.4	1,103,684	100.0
	1989	614,771	45.3	247,538	18.3	494,499	36.4	1,356,808	100.0
	1990	614,976	45.5	232,969	17.3	502,449	37.2	1,350,404	100.0



CITY OF YORK

Between 1989 and 1990 employment in York has increased by 350 mainly in the Institution and Service sectors.

With an employment of 34,500, York represents 2.6% of employment within Metro. Total employment has been relatively steady since 1983 with a small shift from full time to part time and a shift from Manufacturing/Warehousing to Office.

Office and Manufacturing/Warehousing are the largest sectors each representing approximately 28%.

BOROUGH OF EAST YORK

Between 1989 and 1990, there were minimal changes in the amount of employment in East York.

East York has the smallest concentration of employment accounting for 2.2% of Metro's employment. Since 1983 employment has remained at approximately 30,000.

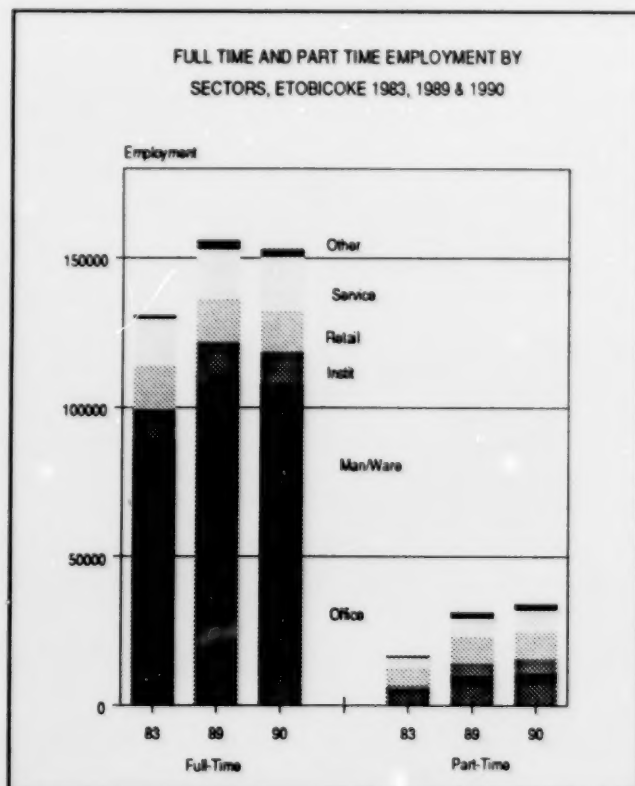
Employment in the Office sector has grown steadily and accounts for one-third of the Borough's employment replacing Manufacturing/Warehousing as the largest sector.

ETOBICOKE

Between 1989 and 1990 full time employment has decreased by 3,000 while part time increased 3,000. The increase in part time affected all six employment sectors. The amount of full time employment decreased in three of the sectors; the majority being in Manufacturing/Warehousing. Although there was a general downsizing in many work places, the largest decline was due to downsizing of two major firms.

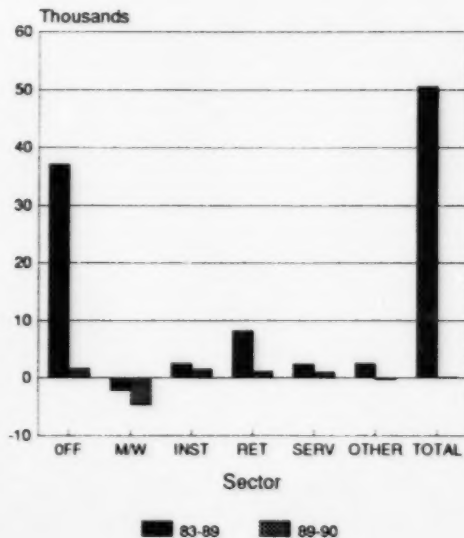
Etobicoke has grown annually since 1983. With an employment of 187,000 it represents 14% of Metro's employment. Its rate of growth has fallen recently as is the case with the rest of Metro and only increased marginally in the past year.

As in York and East York, Office has replaced Manufacturing/Warehousing as the largest sector. Office has grown annually since 1983 and accounts for one-third of Etobicoke's employment. Despite a decrease of 3,500, Etobicoke contains 25% of Metro's Manufacturing/Warehousing employment.





EMPLOYMENT CHANGE BY SECTOR NORTH YORK, 1983-1989 & 1989-1990



CITY OF NORTH YORK

Between 1989 and 1990, employment in North York continued its steady growth and now stands at 316,000; nearly one-quarter of all of Metro's employment.

Office has always been the dominate sector and accounts for 23% of Metro's Office employment and 44% of employment within North York. A significant amount of Office employment is located in the North York Centre and various Office Parks located throughout North York.

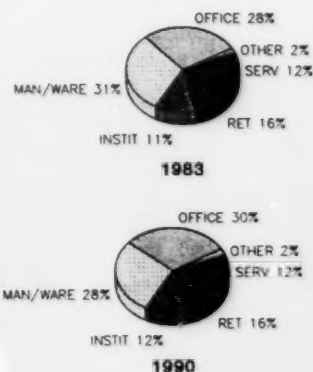
Despite a decrease of 4,700 employees in Manufacturing/Warehousing between 1989 and 1990, North York has the largest proportion, 28%, of Manufacturing/Warehousing employment in Metro. The departure of a large furniture manufacturer as well as the downsizing of several medium-sized firms located north of Downsview Airport, contributed to declining employment in this sector.

CITY OF SCARBOROUGH

Between 1989 and 1990, employment decreased in Scarborough for the first time; a loss of 850. Office continued to increase, however at a slower rate. The Manufacturing/Warehousing and Other sectors lost a total of 2,500 employees while the remaining sectors showed little change. The loss in Manufacturing/Warehousing was the first experienced by that sector in Scarborough and was partially caused by the departure of two large warehouse operations.

Scarborough has grown to the point where its employment of 192,000 accounts for more than 14% of Metro's employment. It accounts for nearly one-quarter of Metro's Manufacturing/Warehousing employment. Office and Manufacturing/Warehousing are the dominate sectors and each contributing approximately 30% to Scarborough's employment.

EMPLOYMENT BY SECTOR SCARBOROUGH, 1983 AND 1990





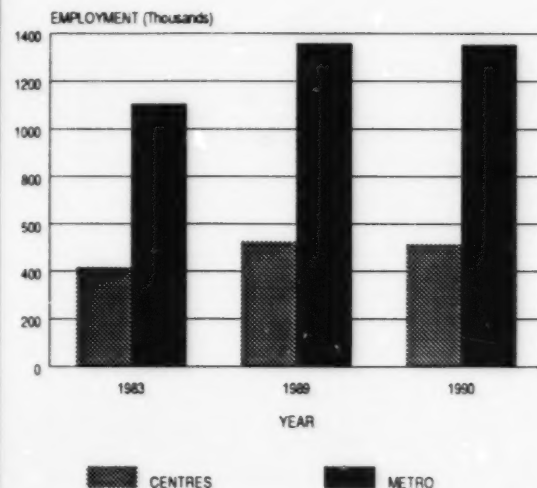
CENTRES

Between 1989 and 1990, the Islington/Kipling/Bloor Centre was the only designated Centre to experience an increase in employment. The Metro-wide loss of Office employment in the last year resulted in decreased employment in the other five Centres.

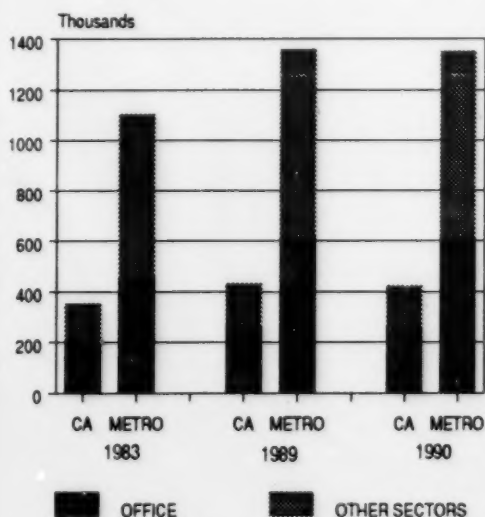
In 1990, The Central Area, North York, Scarborough City, Islington/Kipling/Bloor, Yonge/Eglinton and Yonge/St. Clair Centres combined to account for more than 38% of all of Metropolitan Toronto's employment. More than one-half of Metro's Office employment is located in these Centres.

The Central Area has the largest concentration of employment accounting 43% of Office employment and 31% of total employment in Metro. The Eglinton/Kennedy centre with an employment of less than 1,900 has not been included in this report.

EMPLOYMENT METRO
AND SIX CENTRES
1983, 1989 & 1990



EMPLOYMENT, CENTRAL AREA
AND METRO TORONTO
1983, 1989 & 1990



THE CENTRAL AREA

Between 1989 and 1990, employment in the Central Area decreased by 8,000. Full time employment decreased by more than 10,300 while part time increased by 2,300. Employment in the Office and Manufacturing/Warehousing sectors decreased 5,000 and 3,000, respectively.

Office employment decreased mainly due to the partial relocation of three large firms, and the downsizing of many offices, especially investment corporations. Office remains the dominate sector accounting for 62% of the employment in the Central Area.

The decrease in Manufacturing/Warehousing employment was caused by the relocation of two large firms and downsizing of others.

There were 61,600 part time employees in the Central Area in 1990, an increase of 4% since 1989 and 111% since 1983. More than one-third of the part time employment is in the Office sector. The large increase in part time employment is paralleled by high employment growth in personnel agencies, especially those specializing in Office and Medical positions.



EMPLOYMENT BY CENTRES BY SECTORS
1983, 1989 & 1990

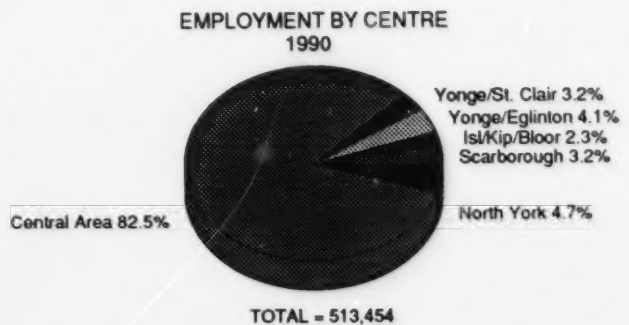
CENTRE	YEAR	OFFICE		MFG/WHSE		OTHER SECTORS		TOTAL	
		#	%	#	%	#	%	#	%
CENTRAL AREA	1983	209,531	59.7	32,981	9.4	108,593	30.9	351,105	100.0
	1989	266,639	61.8	24,038	5.6	140,758	32.6	431,435	100.0
	1990	261,629	61.8	20,890	4.9	140,930	33.3	423,449	100.0
NORTH YORK	1983	9,214	63.6	672	4.6	4,612	31.8	14,498	100.0
	1989	20,685	81.3	132	0.5	4,636	18.2	25,453	100.0
	1990	19,373	80.1	138	0.6	4,679	19.3	24,190	100.0
SCARBOROUGH	1983	5,101	47.4	2,281	21.2	3,373	31.4	10,755	100.0
	1989	9,767	55.0	3,520	19.8	4,475	25.2	17,762	100.0
	1990	10,379	62.8	2,212	13.4	3,943	23.8	16,534	100.0
ISLINGTON/KIPLING/ BLOOR	1983	4,724	52.1	1,221	13.5	3,125	34.4	9,070	100.0
	1989	6,870	56.7	859	7.3	3,988	34.0	11,717	100.0
	1990	7,423	62.0	881	7.4	3,671	30.6	11,975	100.0
YONGE/EGLINTON	1983	10,703	67.8	97	0.6	4,998	31.6	15,798	100.0
	1989	16,807	75.6	47	0.2	5,366	24.2	22,220	100.0
	1990	15,750	75.7	47	0.2	5,024	24.1	20,821	100.0
YONGE/ST. CLAIR	1983	10,902	67.8	499	3.5	3,035	21.0	14,436	100.0
	1989	13,793	83.3	76	0.5	2,682	24.2	16,551	100.0
	1990	13,724	83.3	76	0.5	2,685	16.3	16,485	100.0
TOTAL	1983	250,175	60.2	37,751	9.1	127,736	28.2	415,662	100.0
	1989	334,561	63.7	28,672	5.5	161,905	28.1	525,138	100.0
	1990	328,278	63.9	24,244	4.7	160,932	28.8	513,454	100.0

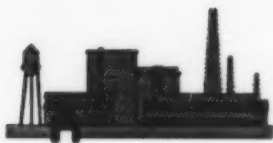
NORTH YORK CENTRE

Between 1989 and 1990 employment in the North York Centre decreased by 1,250 to 24,200. Office employment decreased by 1,300 mainly due to a large publishing company moving from the Centre. The only increase occurred in the Retail sector which grew by 400. Office employment is the largest sector, accounting for 80% of all employment in the Centre; in 1983 it accounted for 64%.

SCARBOROUGH CITY CENTRE

Between 1989 and 1990 employment in the Scarborough City Centre decreased by 1,200 to 16,500. The Office sector increased by 600 while employment in Manufacturing/Warehousing decreased by 1,300 due to downsizing. Office is the largest category in the Centre representing 63% of the employment, an increase from 47% in 1983.





ISLINGTON/KIPLING/BLOOR CENTRE

Between 1989 and 1990 employment in the Islington/Kipling/Bloor Centre increased by 250 to 12,000. Office and Service increased while Institution and Retail decreased. Office is the largest sector accounting for 62% of the employment in 1990, up from 52% in 1983.

YONGE/ EGLINTON CENTRE

Employment in the Yonge Eglinton Centre decreased by 1,400 to 20,800 between 1989 and 1990. While most sectors were steady, Office decreased by 1,000. Office accounts for 76% of the employment in the Centre.

YONGE/ST. CLAIR CENTRE

Between 1989 and 1990 employment in the Yonge/St. Clair Centre decreased by 65 to 16,500. The largest sector is Office which accounted for 83% of the employment in the Centre.

EMPLOYMENT DISTRIBUTION - METROPOLITAN TORONTO 1990



The previous sections in this report have shown the distribution of employment within Metropolitan Toronto by Municipalities and Centres. This map shows the distribution across Metropolitan Toronto.